Welcome to LBCF’s Financial Advisor Program

Participating in our Financial Advisor Program creates a distinct advantage for you and your clients. Financial Advisors can continue to manage their client’s assets and meet their client’s tax and charitable goals.

A WIN-WIN FOR YOU AND YOUR CLIENTS
The Financial Advisor Program benefits everyone involved, creating a significant and positive impact for your client’s charitable causes. You can:

- Continue to manage the assets contributed by your clients on your firm’s investment platforms
- Convert non-managed client assets, such as real estate, closely held interests, businesses, and personal property into charitable dollars that you can manage
- Offer your clients a value-added service by connecting them to some of the best resources and services on the market
- Extend your services to multiple generations through family giving

IDENTIFYING CLIENTS WHO QUALIFY
An ideal client is someone who has one or more of the following:

- Has a high capital gains tax exposure
- Is in a “transition” phase of life: empty nest, retirement, or involved in estate planning
- Wants to leave a legacy for future generations
- Plans to sell a private company
- Wants a charitable tax deduction now with the flexibility to make distributions in the future
- Want to grow their contributions tax-free over time
- Plans to pass down charitable assets for the next generation of family members to advise
- A desire to give something back to their community

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The Financial Advisor Program is valuable to both advisors and their clients. The Long Beach Community Foundation can handle complex charitable transactions, including the donation of real estate and closely held interests, giving financial advisors the power to offer flexible options not otherwise available.

More importantly, advisors can continue to manage their clients’ finances no matter what type of charitable giving vehicle they choose.

John Shadden, Morgan Stanley

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Charitable giving encompasses more than just cash donations. Families and businesses can tap into our expertise to quickly and easily donate hard-to-value assets, and open family or corporate funds to further their charitable goals.

Your clients may use assets they already own to attain a new level of giving; a level they might not have considered possible. We specialize in accepting complex assets for charitable purposes, including:

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<tr>
<th>GIFTS OF REAL ESTATE</th>
<th>GIFTS OF BUSINESS INTERESTS</th>
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<tr>
<td>• Personal Residence</td>
<td>• Closely Held Stock (S-Corp, C-Corp, LLC)</td>
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<tr>
<td>• Commercial Property</td>
<td>• Partnership Interests</td>
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<tr>
<td>• Farmland or Undeveloped Property</td>
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<tr>
<td>• Other Real Property</td>
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<table>
<thead>
<tr>
<th>GIFTS OF PERSONAL PROPERTY</th>
<th>OTHER ALTERNATIVE ASSET GIFTS</th>
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<td>• Royalties, Copyrights, Patents</td>
<td>• Life Insurance Policies</td>
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<td>• Valuable Collectibles</td>
<td>• Retirement Plans</td>
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<td>• Negotiable Instruments</td>
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<td>• Oil and Gas Interests</td>
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<td>• Private Equity</td>
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This list is not intended to be all-inclusive of acceptable complex assets. Charitable gift acceptance is dependent upon asset review and approval.
The Long Beach Community Foundation (LBCF) is a single, trusted resource your clients can use to give nationwide to the causes they care about most, while gaining maximum tax benefits under state and federal law. We offer a variety of giving options - including the ability to set up a charitable fund in your client’s name, or give anonymously. Here are six ways we can help you help your clients achieve their personal and financial goals.

Six Reasons to Work with LBCF

1) WE ARE YOUR PARTNERS  LBCF provides support, information, expertise, and professional administration related to charitable giving options. You stay in control of your client relationships and continue to manage the investments.

2) WE HELP YOU BUILD STRONGER RELATIONSHIPS  Studies show that many high-net-worth individuals are expecting to talk about giving with their advisors.

3) WE HELP YOU CONNECT ACROSS GENERATIONS  When you help families establish charitable funds at LBCF you begin an ongoing process of involvement with current and future generations.

4) PLANNED GIVING EXPERTISE  We help you provide your clients the best charitable giving strategies based on each client’s unique financial situation, tax status, and giving goals.

5) WE CAN GUIDE YOUR GIVING  For clients without specific charitable goals, LBCF can steward their philanthropic dollars to the most pressing needs in the local community through its Community Endowment Fund. Or, LBCF can work with you and your client to connect them with the charities that best match the causes important to them.

6) GREAT GIVING EXPERIENCE  LBCF can establish donor advised funds and are frequently named in bequests as stewards for estate assets a client directs to specific charitable needs.

Giving through LBCF also saves your client time, providing resources for evaluating potential grant recipients, as well as the ability to give to multiple charities with a single gift.
If you work with philanthropic families or companies, we can help you understand and assess tax saving options to make the most of your clients’ charitable giving, while at the same time maximizing your business with your clients. In addition, you will be connecting your clients with the most trusted leader in the philanthropic field. We are recognized for our ability to handle challenging charitable transactions and for our in-depth knowledge of charitable giving both locally and nationally through our expanded network of professionals. Instantly you and your client will have access to staff who will make sure each donation provides the greatest charitable, civic, and financial benefit possible.

The Long Beach Community Foundation is a public charity, so your clients will receive the maximum tax deduction allowed by law, avoid capital gains tax, and may be eligible to receive a lifetime income stream. We look at each donation individually and create giving plans that maximize gifts to the community and provide bottom-line benefits to the donor.

*The Long Beach Community Foundation is not engaged in rendering legal, accounting, or other professional service. If legal advice or other expertise is required, the services of an appropriate professional should be sought.*

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